Mississippi Management and Reporting System

Department of Finance and Administration

MMRS MASH/Training Materials		
8201	LSO Training Administrator	Date Revised: 10/26/2016
		Version: 2
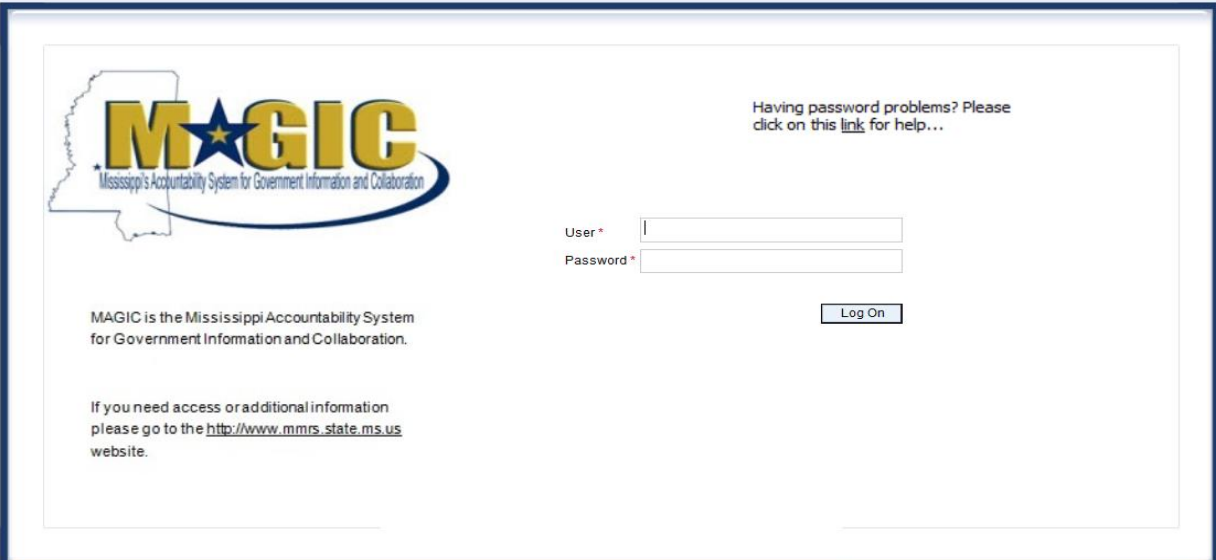
Magic Portal Logon Information

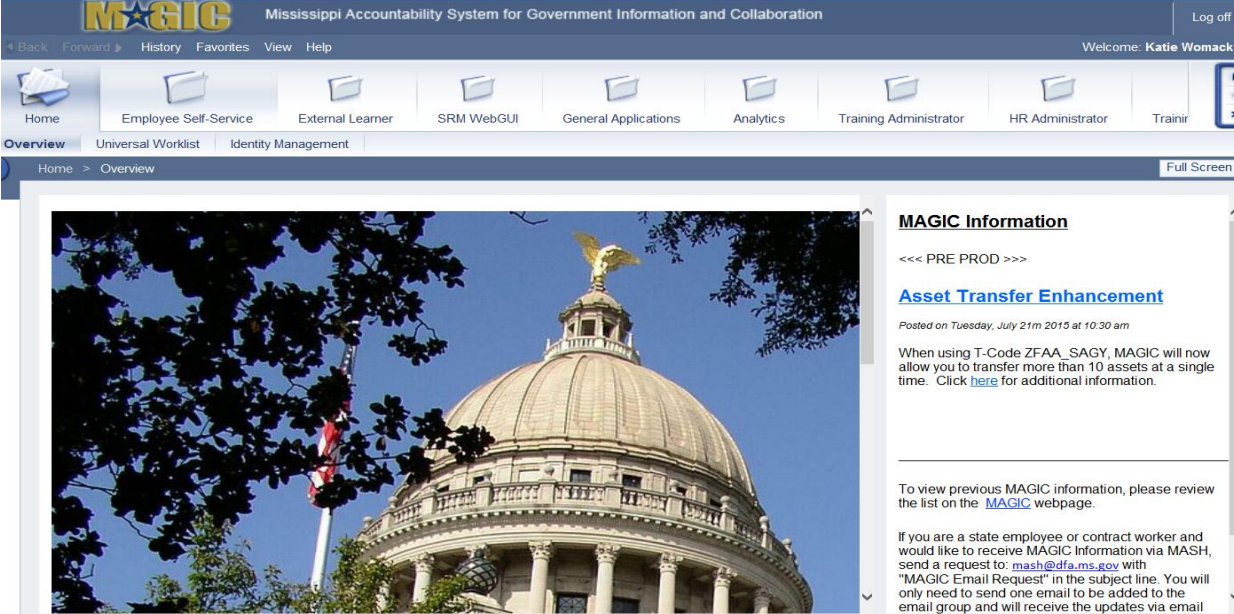The website address used to access MAGIC is: https://portal.magic.ms.gov/irj/portal.
Note: If you have difficulty with viewing the training course, please review _MAGIC Technical Requirements_ on the MMRS website for compatibility issues.

If you have problems with your user ID or password, call the MMRS Call Center at 601-359-1343. Select Option 1 (Security), Sub-option 1 (MAGIC).

Once you log into MAGIC the following screen will appear.

Schedule A Course (Class)

The purpose of this procedure is to schedule a session of a course type from the catalog.

Your Action…	System Response…
1. Select the **Training Administrator** Tab.	The following screen will appear.

Your Action…	System Response…
1. Select **Courses**.	
2. Select **Schedule a Course Date**.	The Create Course Date screen will appear.

Your Action…	System Response…
3. Select the [►] next to the **SOMS Catalog**.	A list of agencies providing training will appear.

Your Action…	System Response…
4. Locate the agency providing the training course.	A list of training Course Groups will appear.

Create Course Date   Help

Start   Close

Period:01/01/2016 - 12/31/2016   Change Period

● Search in Course Catalog
○ Keyword Search

Course Catalog

Course Group	Delivery Method	Availability	Start Date	Location
▼ Finance and Administration Catalog			01/01/1900	
▶ GENIE			01/01/1900	
• SAAS			01/01/1900	
▶ PROFESSIONAL DEVELOPMENT			01/01/1900	
▶ STIMULUS 360			01/01/1900	
▶ ACCESS CHANNEL FOR EMPLOYEES			01/01/1900	
▶ MATA/CONTRACT AWARD			01/01/1900	
▼ SPAHRS			01/01/1900	
▶ SPAHRS MANAGE CONTRACTS T…	Instructor-led Training		01/01/1990	
▶ SPAHRS HUMAN RESOURCES T…	Instructor-led Training		01/01/1990	
▶ SPAHRS PAYROLL A TO Z	Instructor-led Training		01/01/1990	
▶ SPAHRS TRAVEL TRAINING	Instructor-led Training		01/01/1990	
▶ COGNOS			01/01/1900	
▶ PROGRAMMING			01/01/1900	
▶ MS ENTERPRISE LEARNING MGMT SYS			01/01/1900	
▶ PAYMODE			01/01/1900	
▶ DFA-MMRS STAFF ONLY			01/01/1900	
▶ SPREADSHEET			01/01/1900	
▶ MAGIC END USER TRAINING			01/01/1900	

Your Action…	System Response…
5. Select the **Course Group** and highlight the **Course** to be taken.	
6. Select **Start**.	The Create Course Date screen will appear.

Create Course Date

| E 50000250 | Status Planned | Start Date/End Date 04/11/2016 - 12/31/9999 | Location | Course Owner | Delivery Method Instructo |
| | Course Duration 0.00 Hours on 0 Days | Language English | Places Available 14 | | |

Save | Close

Basic Data | Rooms and Materials | Instructors | Qualifications and Target Groups | Prices and Costs | Links | Control Parameters

General
Name: CUSTOMIZING EXCEL 2000 AND USING MACR
Short Text: *   QCEX2K4
Assigned Course Group: ITS SPREADSHEET
Course Language: English
Location: *
Training Provider:
Status: Planned
Organization: Internal
Booking: Booking Allowed

Schedule
Earliest Possible Start Date:
Course Start: Saturday, 00/00/0000, 00:00 Tm.
Course End: Saturday, 00/00/0000, 00:00 Tm.
Duration: 0.00 Hours on 0 Days
Change Schedule

Description
Text Language: English

Description | Course Content | Notes | More...

Description Type: Extended Course Text
Enter description below:
Edit

Price
Internal Price: 150.00 USD
External Price: 450.00 USD

Your Action…	System Response…
7. Search for the desired **Location*** by selecting ⬚.	The Course Location (Title): All Values search screen will appear.

Course Location (Title): All Values

▾ Hide Filter Criteria   Personal Value List Settings

Search term: ◇ [   ] ➡

☑ Restrict Number of Value List Entries To   500

Start Search | Reset

OK | Cancel

Your Action…	System Response…
8. Select **Start Search** to find the desired location.	A List of available Locations will appear.

Description

Course Location (Title): All Values

▼ Hide Filter Criteria   Personal Value List Settings

Search term: ◇ [   ] ➡

☑ Restrict Number of Value List Entries To   [500]

[Start Search] [Reset]

Object abbr. ⌃	Name	Start date	End Date
301 BLDG	ROBERT G CLARK BLDG	01/01/1900	12/31/9999
AG-ETHNIC	AG & FORESTRY MUS - ETHNI…	01/01/1900	12/31/9999
AMORY WIN	AMORY WIN CTR	01/01/1900	12/31/9999
ARCHIVES	ARCHIVES AND HISTORY	01/01/1900	12/31/9999
BATSVLE-WIN	BATESVILLE WIN CTR	01/01/1900	12/31/9999
BILOXI-WIN	BILOXI WIN CTR	01/01/1900	12/31/9999
BRKHVN-WIN	BROOKHAVEN WIN CTR	01/01/1900	12/31/9999
CARTHG-WIN	CARTHAGE WIN CTR	01/01/1900	12/31/9999
CLRKSDL-WIN	CLARKSDALE WIN CTR	01/01/1900	12/31/9999
CLVLND-WIN	CLEVELAND WIN CTR	01/01/1900	12/31/9999

[OK] [Cancel]

Your Action…	System Response…
9. Select the desired location by highlighting the row and select the **OK**.	The system will populate the location on the Create Course Date.
10. Search for the Training Provider by selecting the ⬚.	The Training Provider search screen will appear.

Create Course Date

Training Provider

Search Term: ITS

Select Course Provider Type

Provider Type: All

Find

List

Provider	Provider ID	Provider Ty...	Organization
ITS - Information ...	7000000177	Customer	
ITS - Internal Serv...	7000000178	Customer	
ITS - Security Ser...	7000000179	Customer	
ITS - Telecommun...	7000000180	Customer	
ITS - WCC Operat...	7000000181	Customer	

Select   Close

Your Action…	System Response…
11. Enter agency name and select the **Find**.	
12. Highlight the desired training provider and choose **Select**.	The system will populate the training provider on the Create Course Date.

Create Course Date   Help

E 50000321 | Status Planned | Start Date/End Date 05/02/2016 - 12/31/9999 | Location ROBERT G CLARK BLDG | Course Owner | Delivery Method Instructor-led Training
| | Course Duration 6.00 Hours on 2 Days | Language English | Places Available 15 | |

Save | Close

| Basic Data | Rooms and Materials | Instructors | Qualifications and Target Groups | Prices and Costs | Links | Control Parameters | Contacts | Status Overview | Participants |

General

Name:	SPAHRS MANAGE CONTRACTS TRAININ
Short Text: *	DFACW
Assigned Course Group:	SPAHRS
Course Language:	English
Location: *	ROBERT G CLARK BLDG
Training Provider:	DFA - MMRS US-Jackson
Status:	Planned
Organization:	Internal
Booking:	Booking Allowed

Description

Text Language: English

More...

Description Type: Extended Course Text

Enter description below:

Edit

Schedule

Earliest Possible Start Date:	05/02/2016
Course Start:	Monday, 05/02/2016, 08:30 Tm.
Course End:	Tuesday, 05/03/2016, 16:00 Tm.
Duration:	6.00 Hours on 2 Days

Change Schedule

Price

Internal Price: 0.00 USD

External Price: 0.00 USD

Capacity

Course Min/Opt/Max: * 1   8   15

Your Action…	System Response…
13. Use the drop down menu for **Organization** to select "Internal" or "External."	
14. Select the **Change Schedule**.	The Change Schedule screen will appear.

Change Schedule

Earliest Possible Start Date:	05/02/2016
Schedule Model:	ONE HALF DAY
Weekday:	Any

☐ Period Without Days Off

☐ Recurring Dates

Apply Changes

Schedule

Change Manually | Add Period | Delete Period   Personalize

Date	Weekday	Start Time	End Time
05/02/2016	Monday	08:30:00 am	11:30:00 am
05/03/2016	Tuesday	01:00:00 pm	04:00:00 pm

OK | Cancel

Your Action…	System Response…
15. Select the **Change Manually** to enter a date and time.	
16. Enter the date and Schedule and select **Apply Changes**.	
17. Select **OK.**	The changes will appear on the lower level.
18. Select the **Save**.	A Course created message will appear at the top left hand corner.
19. Select the **Close**.	

Manage Course Participation

Use this procedure to add participants to a course.

Your Action…	System Response…
1. Select the **Training Administrator** Tab.	

Your Action…	System Response…
2. Select **Courses**.	
3. Select **Manage Course Participations.**	The Manage Course Participations screen will appear.

Your Action…	System Response…
4. Select the **SOMS Catalog**.	A list of agencies providing training will appear.

Your Action…	System Response…
5. Locate the agency providing the training course.	A list of training Course Groups will appear.
6. Select the **Course Group** and highlight the **Course** to be taken.	
7. Select **Start**.	The Manage Course Participation screen will appear.

Your Action…	System Response…
8. Select **Book Additional Participants**.	The Book Additional Participants screen will appear.

Your Action…	System Response…
9. Select the ⧉ on the first row by Participant.	The Select Participants screen will appear.
10. Enter a name in the Search Term Field and select "**Find**."	

Select Participants   ▢ ☒

Participant

Search Term: smith

Select Participant Type

Participant Type: Person   ▼

Find

List

	Participant	Participant Ty...	Organization	▲
	Smith , James B	Person	05000070	▬
	Smith , Cynthi...	Person	09414045	
	Smith , David A	Person	07110282	
	Smith , Debra...	Person	03721908	
	Smith , Veronica	Person	06710307	▬

Select   Close

Your Action…	System Response…
11. Highlight the person to be added to the course and choose **Select**.	The system will populate the Person on the Book Additional Participants screen.

Additional Participants

Add Row | Delete Row

* Participant	Company	Booking Priority	Places	Fee	Currency	Settlement Method	Settlement Details
James B Smith B	05000070	Normal ▼	1	150.00	USD	Activity Allocation	Cost Center: 1501...
		Normal ▼	1	150.00	USD		

OK Cancel

Your Action…	System Response…
12. Select **OK**.	A Participant was successfully booked message will appear at the top left hand corner.
13. Select **Close**.	

NOTE: If more than one person needs to be added to the course, select the "Add Row" button.

Firmly Book A Course

The purpose of this procedure is to change a class to a "firmly booked" status. When a course status is "planned," participant priority can be changed. Note that no emails will be sent to participants until a course is listed as "firmly booked." You will not be able to firmly book a course if no participants have registered.

Your Action…	System Response…
1. Select the **Training Administrator Tab.**	
2. Select **Work Overview.**	The Worklist of Courses screen will appear.

Your Action…	System Response…
3. Select **Change Query.**	This action will allow you to refine the courses shown on the Worklist.

Your Action…	System Response…
4. Apply any changes to search parameters by selecting ▢ or drop down boxes.	
5. Then select **Apply**.	Your search results will show on the Worklist of Courses

Your Action…	System Response…
6. Select the course that needs to be firmly booked by highlighting the row and select the **Firmly Book**. **NOTE**: You cannot change a course to firmly booked unless someone has registered.	A Firmly Book screen will appear.
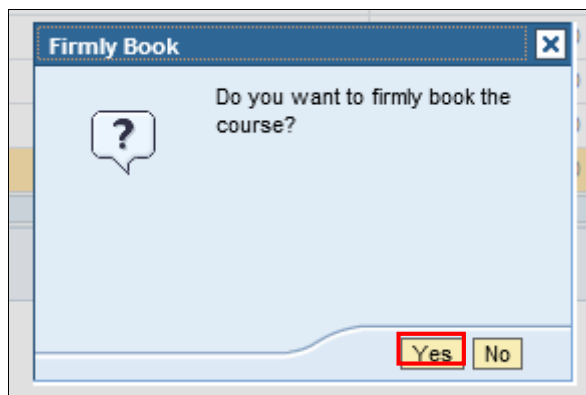
Your Action…	System Response…
7. Selecct **Yes**.	A "Course was firmly booked" message will appear at the top left hand corner.

View Or Print Roster

The purpose of this procedure is for Training Administrators to print or view the roster for a class for their agency. Attendees must be approved by their agency approver before they will appear on this report.

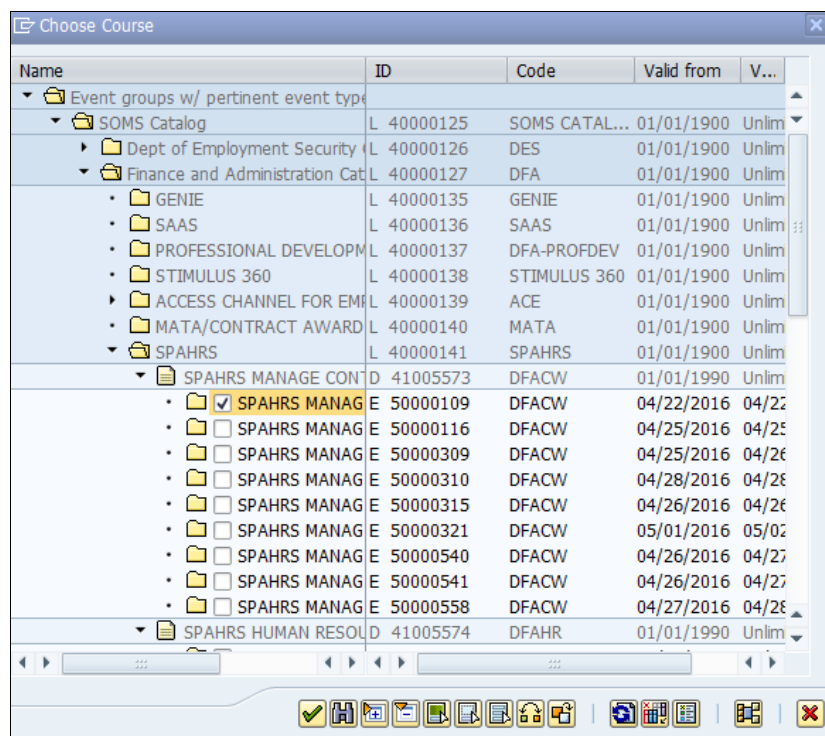**NOTE:** SAP GUI is required for this procedure.

Your Action…	System Response…
1. Select the **Training Administrator Tab**.	
2. Select **Reports**.	A list of reports appears.
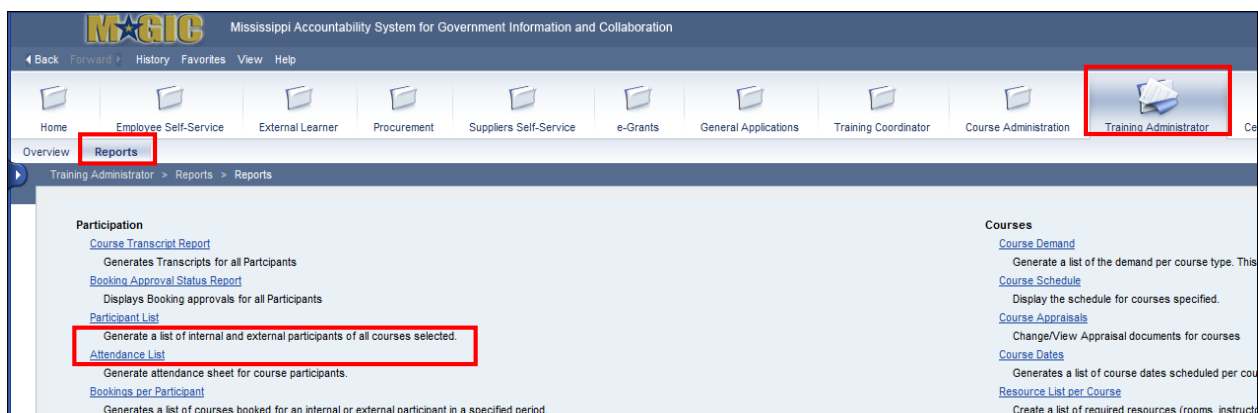
Your Action…	System Response…
3. Select **Attendance List.**	The Attendance List screen will appear.
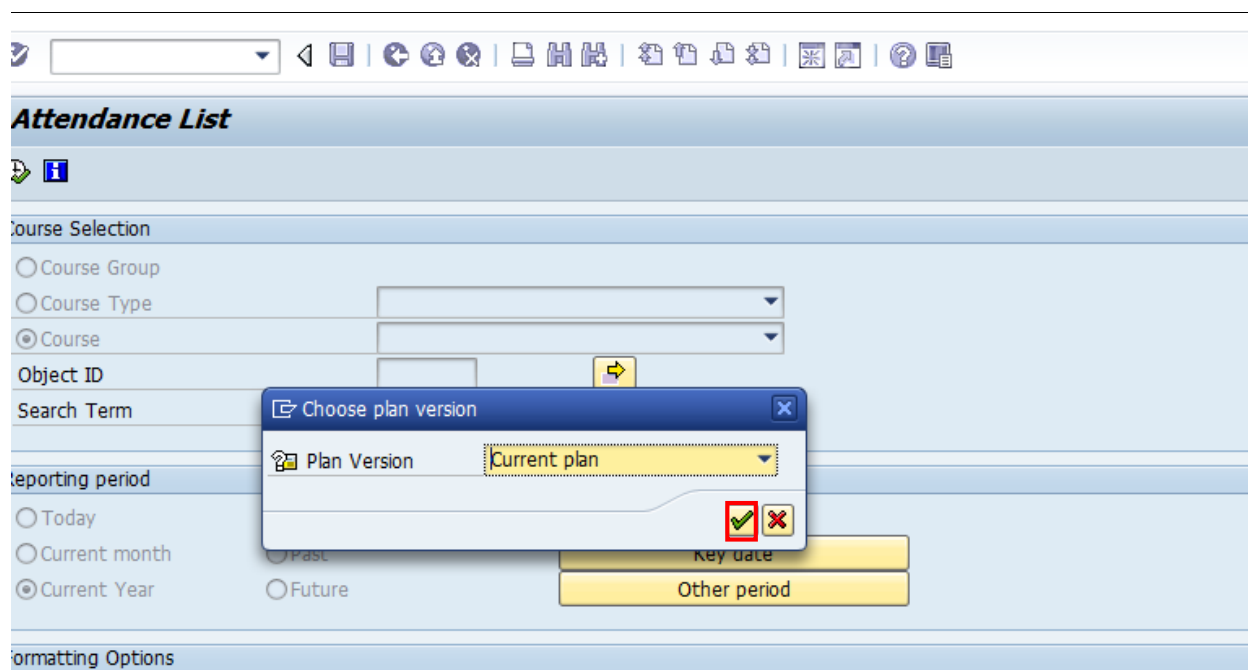
Your Action…	System Response…
4. In the **Course** Field select **Instructor-Led.**	The Choose plan version window will appear.
5. Select the ✔ box for Current Plan.	
6. Select the ⬜ for the Object ID in order to search for the class roster.	The Choose Course screen will appear.

Your Action…	System Response…
7. Place a check in the box to select the class.	
8. Select ✅.	The Object ID(s) transferred message will appear on the bottom left hand side of the screen.
9. Set the reporting period if you would like to narrow the results for that class offering. Then select the 🕒 execute button on the top of the screen.	The Participant List will appear.

Your Action…	System Response…
10. Select **WinWord** to open it in Microsoft Word to be able to print the roster.	

NOTE: You may have to close other Word applications in order for the roster to print.

Manage Course Follow-Up

The purpose of this procedure is to follow up on courses, including attendance, pass/fail results, and proficiency if applicable.

Your Action…	System Response…
1. Select the **Training Administrator Tab.**	The following screen will appear.
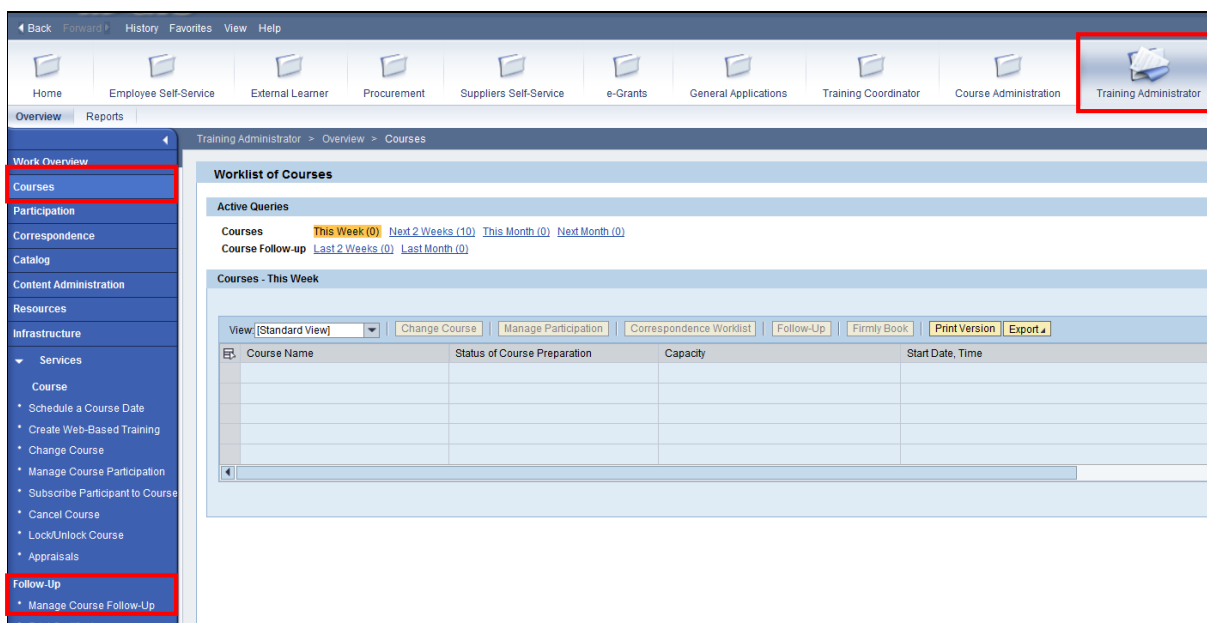
Your Action…	System Response…
2. Select **Courses.**	
3. Select **Manage Course Follow-up.**	The Course Follow-Up screen will appear.

Your Action…	System Response…
4. Enter the **Course Name**; the parameters can be narrowed using the date range or location.	
5. Select **Go**.	The Select Course screen will appear.

Your Action…	System Response…
6. Highlight the desired course by selecting the gray box in front of the course and select **Next**.	The Confirm Attendance screen appears.

Your Action…	System Response…
7. Select the drop down arrow to mark the attendance as present, absent, or unconfirmed. You can also use the box to mark **All Present** or **All Absent**.	
8. Select **Next** to continue to Evaluate Participants	The Evaluate Participants screen will appear.

Course Follow-Up

Selected Course SPAHRS PAYROLL A TO Z

1	2	3	4
Select Course	Confirm Attendance	**Evaluate Participants**	Transfer Q

◀ Previous   Next ▶   Close

Assess the participants by selecting the appropriate value

Participants

🖳	Participant	Participant Assessment	Reason for Not Passing	
	Perry , Susan	Course Passed ▼		
	Wagoner , Catherine E	Course Passed ▼		

All Passed   All Not Passed

Your Action…	System Response…
9. Select the drop down arrow to mark the participants as "Course Passed," "Course Failed," or "Not Rated" if applicable. The "All Passed" or "All Failed" button can be used to select all.	
10. Select **Next** to move onto the Transfer Qualification section.	The Transfer Qualification screen will appear.

☑ No qualifications were found which could be transferred

1	2	3	4	5	6
Select Course	Confirm Attendance	Evaluate Participants	**Transfer Qualification**	Review and Save	Completed

◀ Previous   Next ▶ | Close

Select the proficiency of the participants

Your Action…	System Response…
11. Select the drop down box to select the correct qualification. Not all courses have qualifications.	
12. Select **Next**.	The Review and Save screen will appear.

Course Follow-Up

Selected Course SPAHRS PAYROLL A TO Z

1	2	3	4	5
Select Course	Confirm Attendance	Evaluate Participants	Transfer Qualification	**Review and Save**

◀ Previous   Next ▶ | Close

Review the entries for the course and save
☑ Flag course as followed-up when saving data

Participants

Participant	Attendance	Participant Assessment	Reason for Not Passing	Qualification	Proficiency
Perry , Susan	Present	Course Passed			
Wagoner , Catherine E	Present	Course Passed			

Your Action…	System Response…
13. The "Flag Course as followed-up when saving data" box **MUST** be checked in order to flag the course as followed-up.	
14. Select **Next**.	A "Detailed follow-up information has been saved" message will appear at the top left hand corner.
15. Select **Close.**	

Printing Course Certificate

The purpose for this procedure is to allow Training Administrators to provide a certificate of completion to participants in a course. There is a required template that is used to complete this process; administrators must have it saved on the computer. This action will also require SAPGUI installation on the computer to be used to print the certificate.

Your Action…	System Response…
1. Select the **Training Administrator Tab.**	The following screen will appear.

Your Action…	System Response…
2. Select the **Courses.**	
3. Select **Print Certificate** under Follow-up.	The Participant List will appear.

Your Action…	System Response…
4. Select the **Instructor-led Training** for the Course from the drop down box.	
5. Select the ⬜ for Object ID.	The "Choose plan version" window will appear.

Your Action…	System Response…
6. Select the ✔ box for Current Plan.	The "Choose Course" screen will appear.
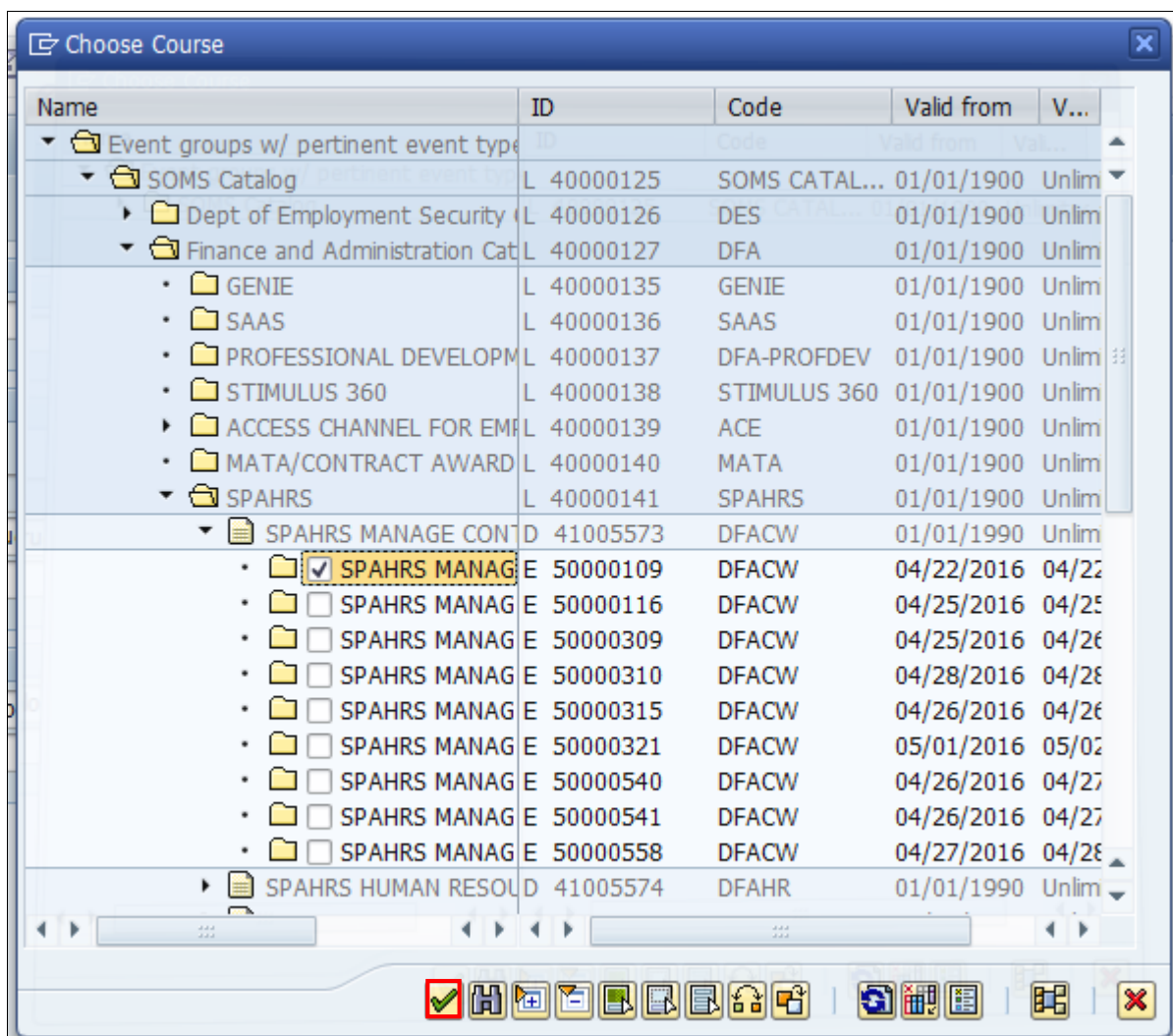
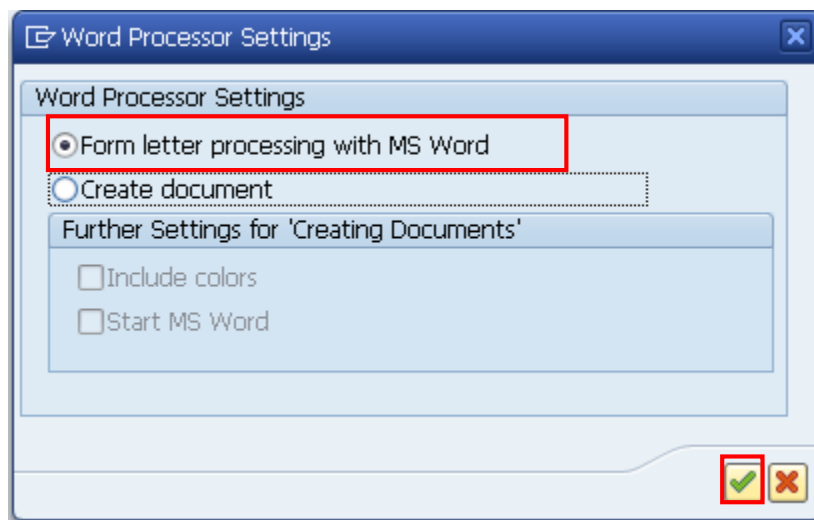| Your Action…	System Response…
11. Place a check in the box to select the class.	
12. Select the ✔ box.	
13. Select the ⏳ execute button on the top of the screen.	The Participant List will appear.

Your Action…	System Response…
14. Select the **Word Processing Icon** ( ).	The Word Processor Settings screen will appear.

Your Action…	System Response…
15. Select **Form letter processing with MS Word** and select the .	The MS Word Settings will appear.
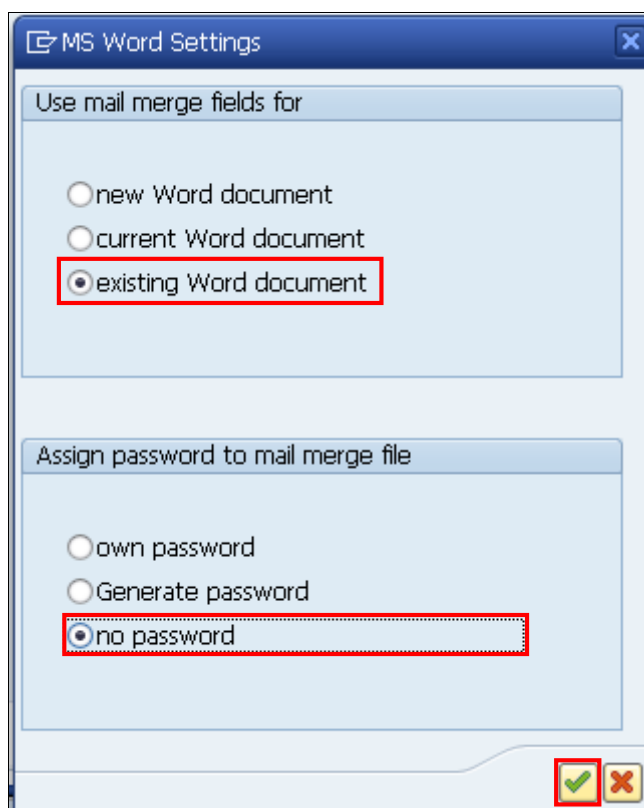
Your Action…	System Response…
16. Select **existing Word document** and **no password** and select the ✅.	The "Open MS Word file" screen will appear.
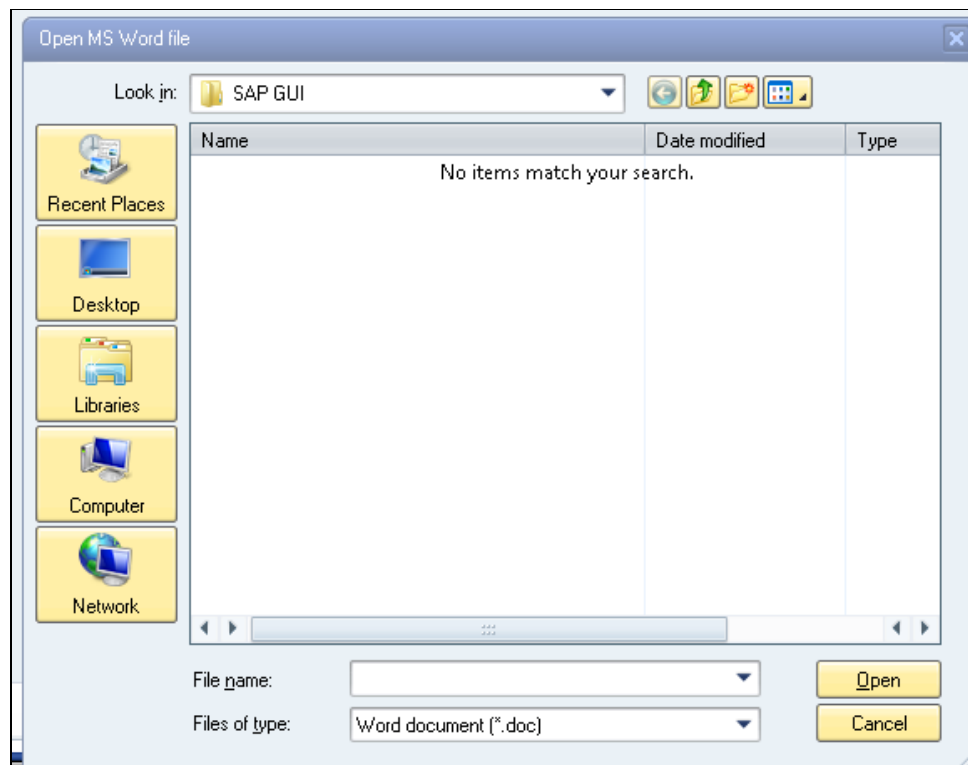
Your Action…	System Response…
17. Locate the template stored on the computer.	Once the template is selected, the system will open the template.
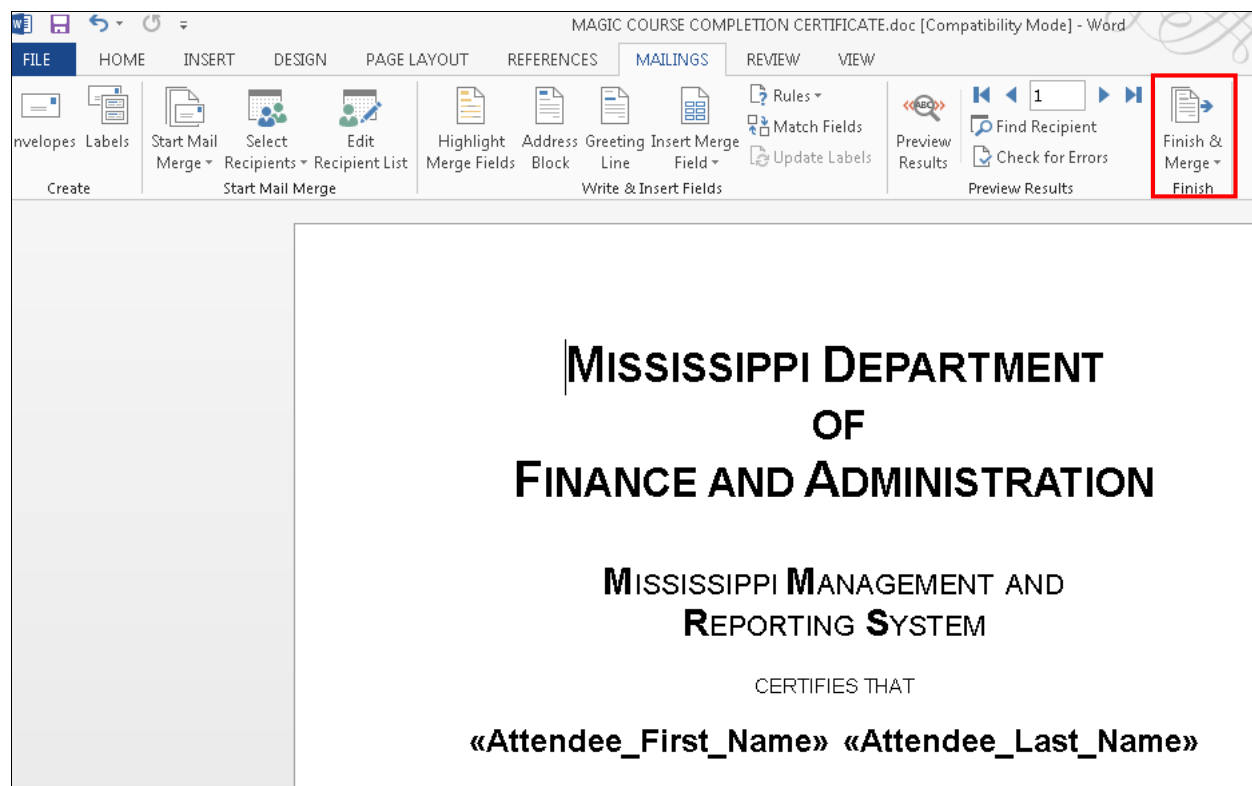
Your Action…	System Response…
18. Select the drop down arrow on the Finish & Merge button.	
19. Select Edit Individual Documents.	The Merge to New Document screen will appear.
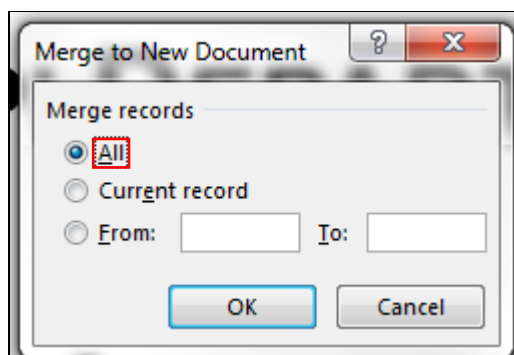
Your Action…	System Response…
20. Select **All.**	A new Word document will open with all of the attendees and course information included